Acting on Behalf of an Agent Job Aid
Agency Managers

Overview:

Agency Managers have the ability to act on behalf of the Agents within the Agency, enabling them to step in to complete tasks or assist consumers in the Agent's Book of Business.
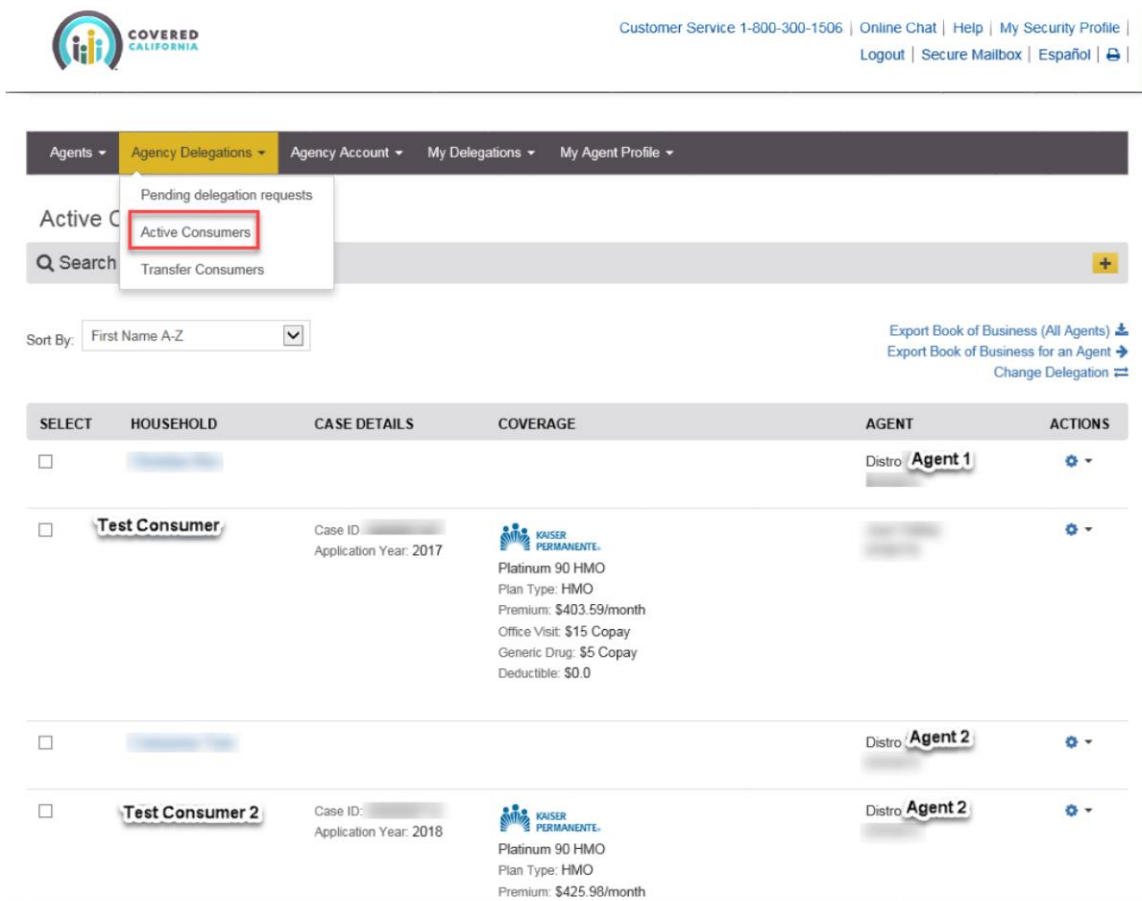
Agency Managers can:
- View Consumer details
- Accept an Agent's pending delegation requests
- Complete and submit an application for a consumer on behalf of the Agent

View Consumer Details

An Agency Manager has access to view Consumer details for all consumer cases delegated to Agents within the Agency.

From the dashboard, under the "Agency Delegations" tab drop-down menu, select "Active Consumers" link to navigate to the **Active Consumers** page.

The Active Consumer page will display all of the consumers delegated to the Agents within the agency. An Agency Manager is able to view the consumer information and application for any agent listed in this list.
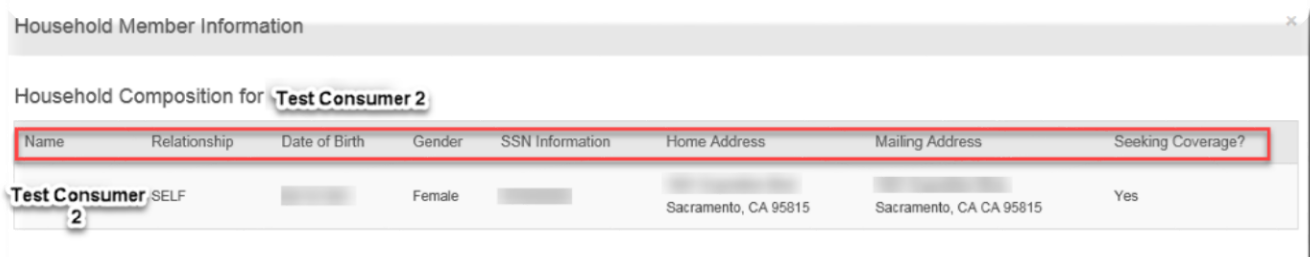
This section displays:
- Consumer Name
- Case Number
- Application Year
- Health Plan Information (if applicable)
- Agent Delegated to the consumer case
- Agent License Number
- Edit Menu ⚙▾

To view additional consumer data, click on the ⚙▾ and click on the "Household" and/or "Eligibility" links to view additional consumer information.

Household Information displays:
- Consumer Name
- Relationship to Primary Contact
- Date of Birth
- Gender
- SSN Information
- Home and Mailing Address
- Seeking Coverage Information

Household Eligibility Section Displays:

- Covered California Eligibility Status for the Household
- Available Advance Premium Tax Credit (Dollar Amount)
- Name of the Consumer
- Medi-Cal Eligibility Status
- Advance Premium Tax Credit Status
- Cost Sharing Reduction Status

Accepting Pending Delegations on Behalf of an Agent

Agency Managers can accept pending delegation requests on behalf of the agents within their agency. Agency Managers navigate to the **Agency Delegations** drop-down menu and select "Pending Delegation Requests" from the options.
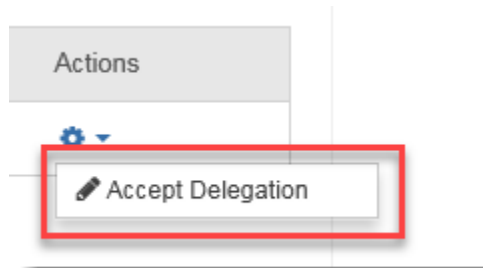
This will navigate the Agency Manager to the "Pending Delegations" page. The Agency Manager will see a list of all consumers requesting delegation with agents within the agency.
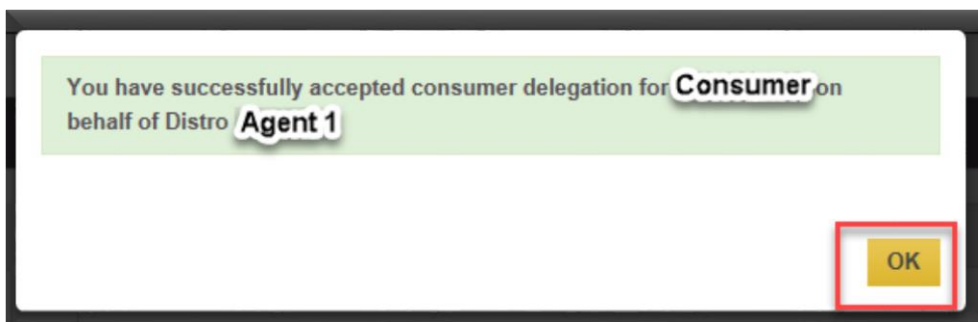

The page displays:
- Consumer Name
- Received on: Date the Request was made by the consumer
- Agent Name: The Agent Requested as a Delegate
- Actions Column

From the **Actions** column, the Agency Manager will click the ⚙▾ and the "Accept Delegation" link will display.

Click on "Accept Delegation" to accept the delegation on behalf of your agent.

The Agency Manager will get a pop-up confirmation screen:
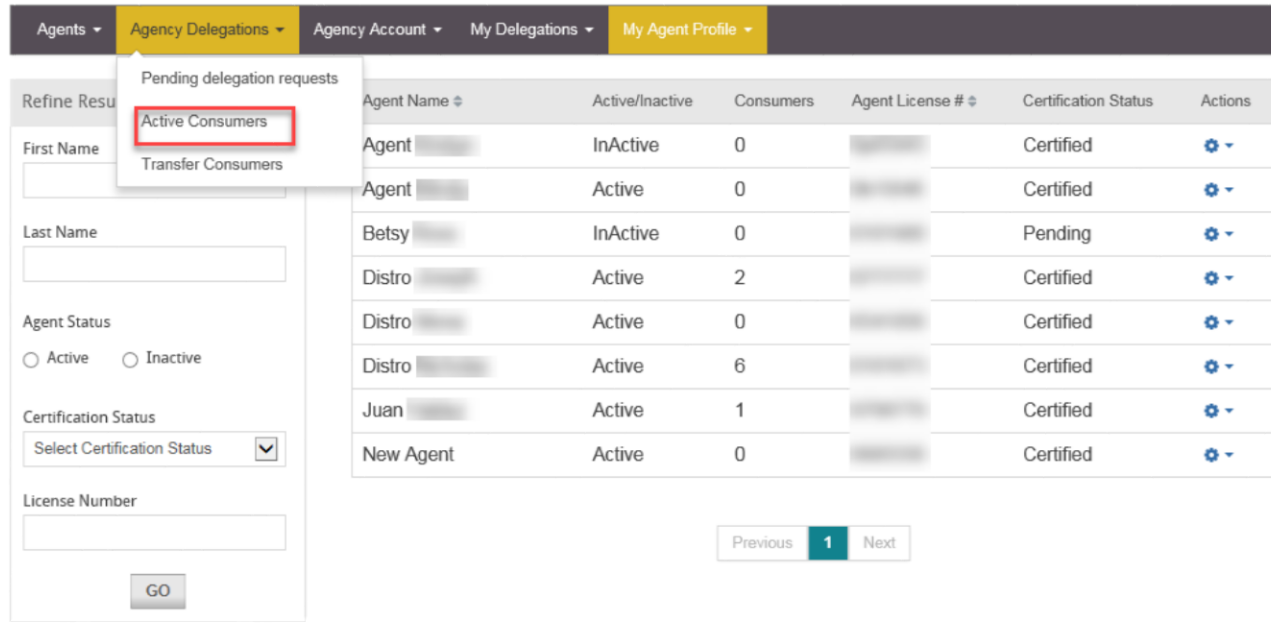
Select "Ok" to finalize the delegation to the agent within your agency.

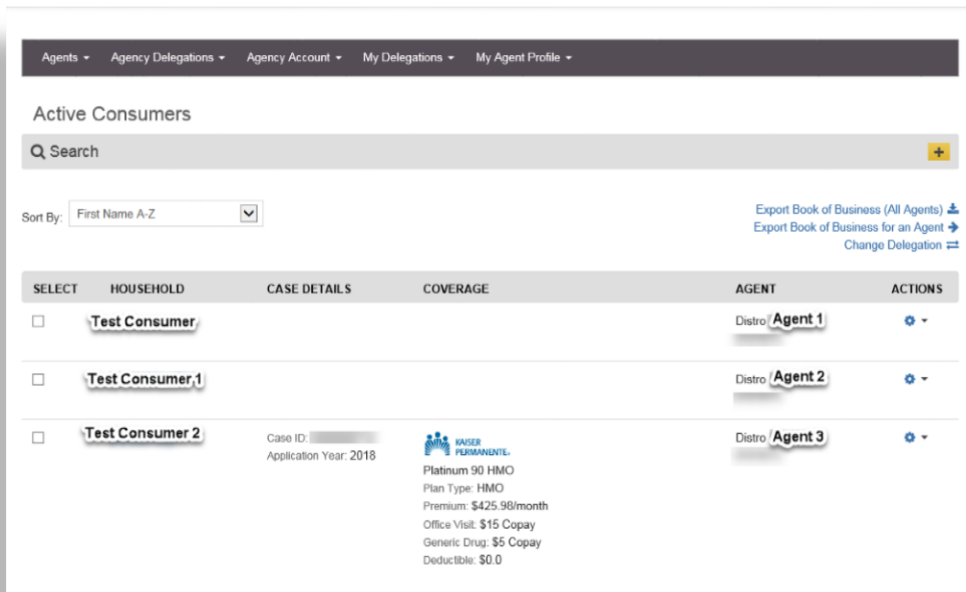**Complete and Submit an Application on Behalf of an Agent**

Agency Managers have the ability to assist consumers delegated to the Agents, within the Agency, with application completion and submission.

In the **Agency Delegation** drop-down menu, select "Active Consumers".

The Agency Manager is navigated to the **Active Consumers** page where there is a complete list of all consumers delegated to Agents within the Agency. Here, the Agency Manager can select the consumer they need to assist with their application.

When the Agency Manager identifies the consumer they are assisting in the list, they can access the consumer case by:
1) Clicking the consumer's name, or
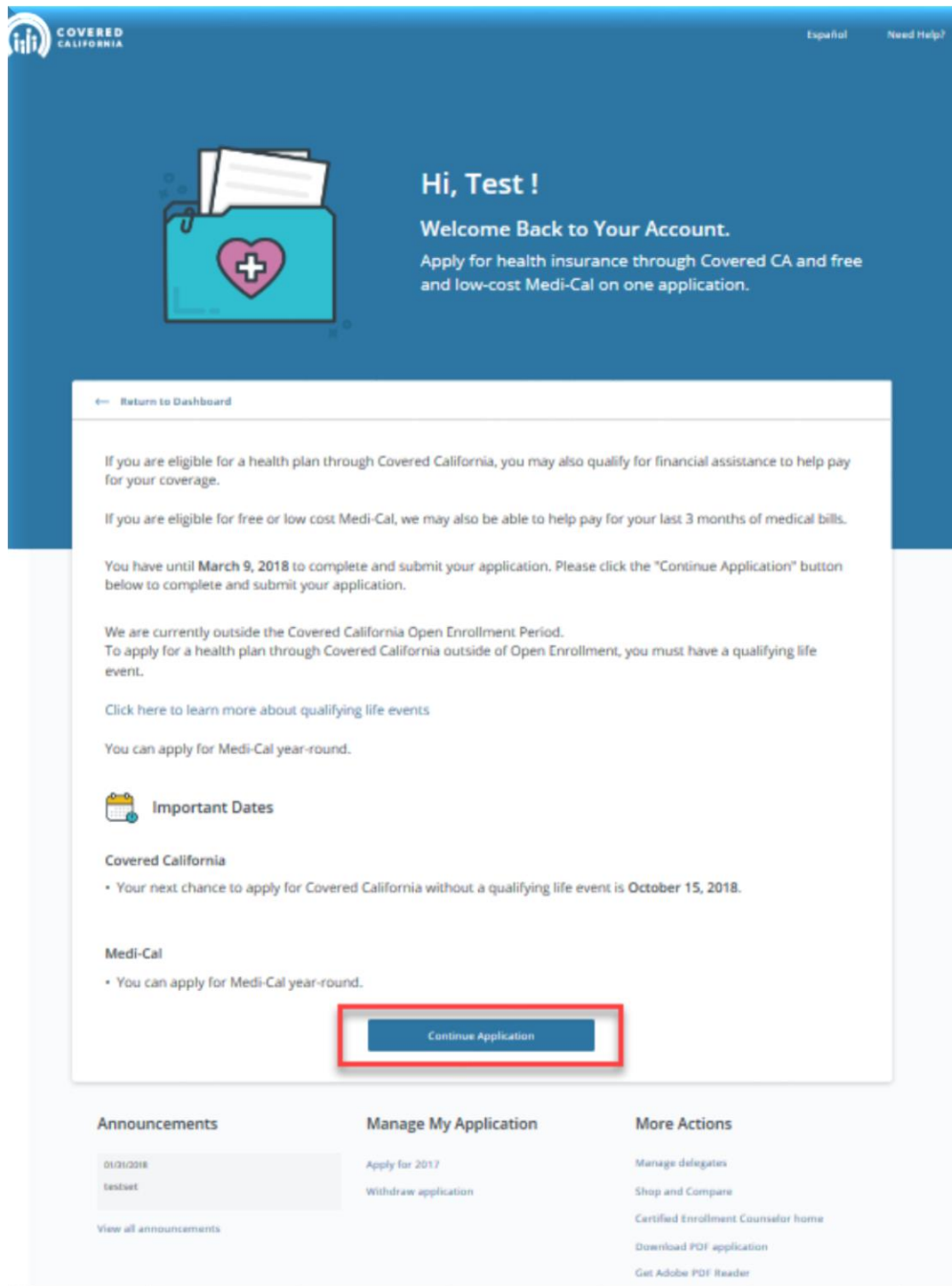2) Select ⚙▾ and then click "Account" link
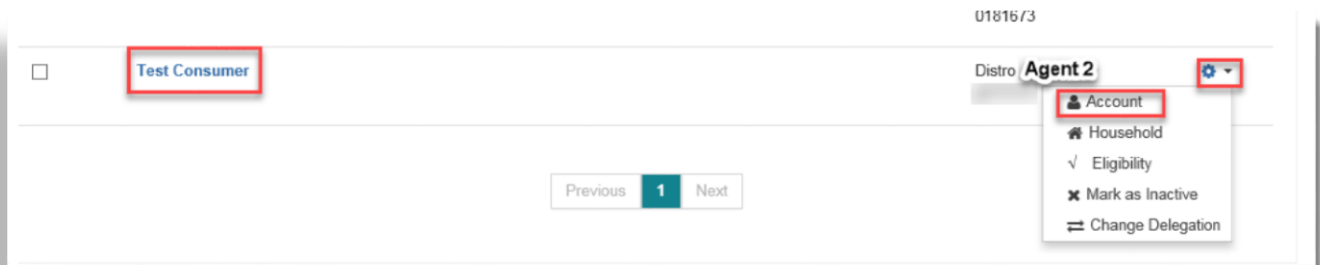
A popup message will display, confirming that the Agency Manager wishes to navigate to the consumer's individual application.
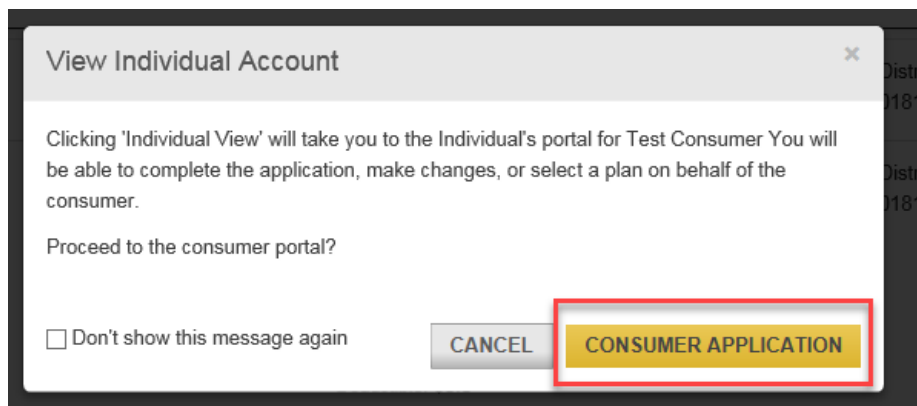
If Agency Manager selected the wrong consumer, the Agency Manager will select "Cancel" button and navigate back to the **Active Consumer** page.

The Agency Manager will select "Consumer Application" button to continue to the application homepage.

The Agency Manager is able to complete a Report a Change, submit the application for an eligibility determination and or assist with plan selections and terminations.